

CYNTAX, LLC

908 Merchants Walk, Huntsville, AL 35801
Phone: 256-518-2239 FAX: 256-518-2297
www.cyntax-hsv.com

2018 INCOME TAX INFORMATION

Taxpayer's Full Name _____ Spouse's Full Name _____
Soc. Sec. No. _____ Date of Birth _____ Soc. Sec. No. _____ Date of Birth _____
Occupation _____ Driver's License No. _____ Occupation _____ Driver's License No. _____
Driver's License Issue Date: _____ Expiration Date: _____ Driver's License Issue Date: _____ Expiration Date: _____
Home Address _____
Home Phone _____ Cell Phone _____ Cell Phone (Spouse) _____
Email address _____ Email address (Spouse) _____

DEPENDENTS

Full Name	Social Security Number*	Date of Birth	Relationship

*Please bring Social Security cards for verification if we do not have a copy.

IMPORTANT ITEMS TO BRING

- W-2s from all employers
- Social Security Benefits Statement (SSA-1099)
- Unemployment Compensation (1099-G)
- Form 1095 – Proof of Health Insurance
- Forms 1099: 1099-MISC (Miscellaneous Income); 1099-INT (Interest); 1099-DIV (Dividends); 1099-B (Sale of stocks/securities); 1099-R (Pensions & Annuities/Retirement Plan Withdrawals); 1099-C or 1099-A (Debt Forgiveness); 1099-K (Credit card/3rd party payments)
- Form K-1 from Estates/Trusts, Partnerships or S Corporations
- Form W-2G for Gambling Winnings
- Mortgage Interest Statement (If you bought/sold/refinanced a home in 2018, please provide a copy of the settlement statement)
- Real estate/property taxes paid
- Car Tag Receipts
- Proof of charitable contributions
- Form 1098-T from college + dates & amounts paid for tuition/books
- Student loan interest information
- Stock or property sold? Bring historical cost basis
- Purchase price/cost basis for any stock declared worthless
- Medical Savings Account/Health Savings Account info

If you are a new client, please bring a copy of last year's tax return.

QUICK QUESTIONNAIRE

(Check any which apply and bring all data)

During 2018, did you:

- _____ Have a change in marital status due to marriage/divorce? Any change in number of dependents?
- _____ Have qualifying health insurance for everyone in your household? Was it purchased online through the Marketplace? (Bring Form 1095)
- _____ Receive Social Security benefits or Unemployment Compensation? (Bring SSA-1099 for Social Security; 1099-G for Unemployment)
- _____ Make any estimated tax payments? Please provide payment details on the next page.
- _____ Transfer or rollover any 401(k) or IRA accounts? If so, bring 1099-R.
- _____ Contribute (or do you plan to contribute) to an IRA or Roth IRA? Provide details.
- _____ Make a donation to charity from a traditional IRA?
- _____ Incur any education expenses for yourself, your spouse, or dependent? Receive education benefits through a prepaid tuition program (PACT or Alabama 529 Plan)? Pay student loan interest? Contribute to the Alabama College Counts 529 Plan?
- _____ Pay for child/dependent care? If so, we need the name, address, social security number/EIN of your child care provider, plus the total amount you paid during 2018. Did you receive any employer-provided dependent care assistance benefits?
- _____ Have unreimbursed work-related expenses? (Union dues, professional association dues, uniforms, job search, etc.)
- _____ Receive any income from a pension, profit-sharing, 401(k), Retirement, Keogh, IRA, Roth, or tax sheltered annuity plan? (Bring 1099-R)
- _____ Have any out-of-pocket expenses incurred as a volunteer? (This includes mileage, uniforms, and supplies).
- _____ Pay (or receive) alimony? (If you paid alimony, please provide the name, SSN, and address of the person receiving payments).
- _____ Purchase a new home? Sell or refinance an existing home? Please provide a copy of the settlement statement.
- _____ Sell or cash in stocks, bonds, U.S. savings bonds, or property? If so, bring form 1099-B. Any stocks declared worthless? Need basis.
- _____ Earn any Municipal Bond interest?
- _____ Start a business or purchase a rental property?
- _____ Have income (or loss) on K-1 from any Partnership, LLC, S Corp, Estate or Trust? (Bring K-1)
- _____ Have foreign income or pay foreign taxes? Have foreign investment/bank accounts valued at over \$10,000 at any time during 2018?
- _____ Make any internet purchases from out-of-state retailers on which no sales tax was paid? If so, what was the total amount of those purchases?

2018 ESTIMATED TAX PAYMENTS

Federal Estimated Tax Payments

State Estimated Tax Payments

Date Due	Amount Paid	Date Sent	Date Due	Amount Paid	Date Sent
4/17/18			4/17/18		
6/15/18			6/15/18		
9/17/18			9/17/18		
1/15/19			1/15/19		

SCHEDULE A – ITEMIZED DEDUCTIONS

<u>UNREIMBURSED MEDICAL EXPENSES</u>	<u>TAXES PAID</u>
Prescription Drugs. \$ _____	Real Estate Taxes. \$ _____
Medical Insurance Premiums. \$ _____	Personal Property Taxes. \$ _____
Long-Term Care Ins. Premiums. \$ _____	State/Local Income Taxes. \$ _____
Medicare Premiums. \$ _____	Sales Tax paid on Car/Boat/RV. \$ _____
Doctors \$ _____	Car Tag (Ad Valorem Tax). \$ _____
Dentists \$ _____	<u>CHARITABLE CONTRIBUTIONS</u>
Clinic/Lab Tests. \$ _____	Cash/Check Contributions. \$ _____
Eyeglasses/Contact Lenses. \$ _____	Non-Cash Contributions. \$ _____
Hearing Aids/Batteries. \$ _____	_____
Orthopedic Shoes/Braces. \$ _____	_____
Medical Lodging. \$ _____	Miles for Charity:
Miles for Medical Treatment:	_____ miles @ .14 per mile. \$ _____
_____ miles @ .18 per mile \$ _____	<u>MISCELLANEOUS DEDUCTIONS</u>
<u>INTEREST EXPENSE</u>	Unreimbursed Business Expenses. \$ _____
Home Mortgage Interest Paid to	Union/Professional Dues. \$ _____
Financial Institutions. \$ _____	Safe Deposit Box. \$ _____
Home Equity Interest. \$ _____	Tax Return Preparation Fee. \$ _____
Home Mortgage Interest Paid to Individual. \$ _____	Business Publications. \$ _____
Name/Address _____	Business Phone Calls/Cell Phone Usage. \$ _____
_____	Tools, Supplies, Equipment. \$ _____
Social Security No. _____	Job Search Expenses. \$ _____
Deductible Points Paid. \$ _____	Gambling Losses. \$ _____
Investment Interest. \$ _____	

SCHEDULE C – BUSINESS INCOME

Business Name _____ ID Number _____

<p><u>Gross Income:</u> Gross Income. \$ _____ Less: Returns & Allowances. \$ _____</p> <p><u>Cost of Sales:</u> Beginning Inventory. \$ _____ Purchases. \$ _____ Cost of Labor. \$ _____ Materials & Supplies \$ _____ Freight In \$ _____ Other _____ \$ _____ Ending Inventory. \$ _____</p> <p><u>Deductions/Expenses:</u> Advertising. \$ _____ Car & Truck Expenses. \$ _____ Business Miles: _____ miles @.545 per mile. \$ _____ Bank Fees. \$ _____ Collection Expenses. \$ _____ Contract Labor. \$ _____</p>	<p><u>Deductions/Expenses (continued)</u> Employee Benefit Plan. \$ _____ Insurance. \$ _____ Interest (Mortgage). \$ _____ Interest (Other). \$ _____ Janitorial/Cleaning. \$ _____ Legal/Accounting Fees. \$ _____ Meals \$ _____ Office Expenses. \$ _____ Postage. \$ _____ Professional Development \$ _____ Professional Dues/Subscriptions. \$ _____ Rent or Lease. \$ _____ Repairs/Maintenance \$ _____ Salaries \$ _____ Supplies \$ _____ Taxes & Licenses. \$ _____ Telephone \$ _____ Travel (Hotel/Airfare). \$ _____ Utilities \$ _____ Home Office (100% Business Use): House Sq. Ft. _____ Office Area Sq. Ft. _____</p>
---	---

MAJOR PURCHASES – SCHEDULE C

DESCRIPTION	DATE PURCHASED	COST	TRADE-IN (IF ANY)

SCHEDULE E – RENTAL PROPERTY/ROYALTIES

Property Description: _____

Gross Rental Income:\$ _____

Number of days rented in 2018: _____

Number of days used personally: _____

Expenses:

Advertising\$ _____

Management Fees\$ _____

Auto/Travel Expense\$ _____

Mortgage Interest\$ _____

Mileage:

Other Interest\$ _____

_____ miles @.545 per mile.\$ _____

Professional Fees\$ _____

Cleaning/Maintenance\$ _____

Repairs\$ _____

Commissions.\$ _____

Supplies.....\$ _____

Insurance\$ _____

Taxes\$ _____

Utilities\$ _____

MAJOR PURCHASES – SCHEDULE E

DESCRIPTION	DATE PURCHASED	COST	TRADE-IN (IF ANY)